

COSMETICS · TUNISIA · EXECUTIVE EDITION

# Lodet · Category Report

Where Lodet stands against L'Oreal, and the ground a smaller house can actually win.

DOCUMENT
LDT-26-288

PREPARED
October 2026

SCOPE
57 products · L'Oreal FY2024

STATUS
Illustrative · not audited

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# The read

Lodet does not compete with L'Oreal on size, and should not try. It wins where a global portfolio is slow: a 57-product shelf that a woman in Tunis reads in seconds, prices from 11 to 79 dinars, and a voice that speaks French and Arabic at home. This market briefing asks one question of that advantage: **Where can a Tunisian house win against a global portfolio?**

| 57 | 20 | 8 | 97 |
|---|---|---|---|
| products on the Lodet shelf | median price, TND (about €6) | categories, hair-led | TND for the full Amino hair ritual |

### WHAT HOLDS

A clear entry rung: 29 products at 20 TND or less. A house line (L'Odet Amino, Hydra-Hyaluronique, Bloom and Sublime mists) that carries the brand at 29 to 79 TND. Large 1000 ml formats that cost her 1.8 TND per 100 ml.

### WHAT TO FIX

Hair is 53% of the shelf, so skin and mist are under-built for the gifting she already does. 28 products are on sale, which risks training her to wait. Claims wording still describes rather than specifies.

> The plan: keep the shelf small, make every rung legible, and say only what can be proven.

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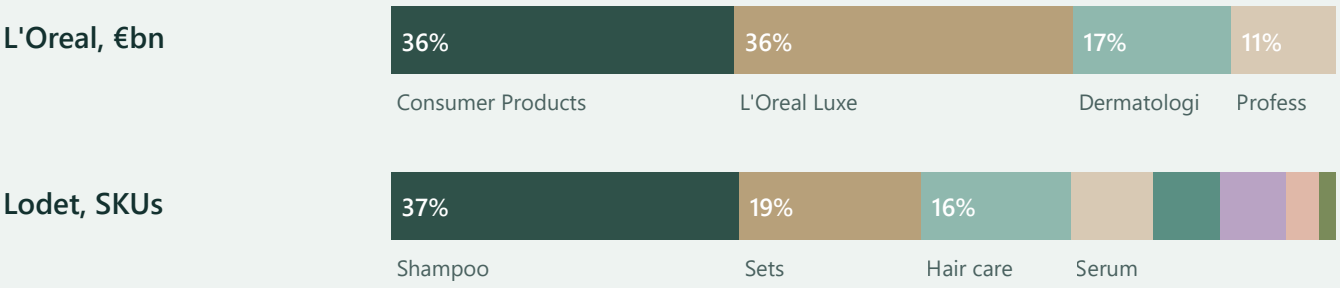
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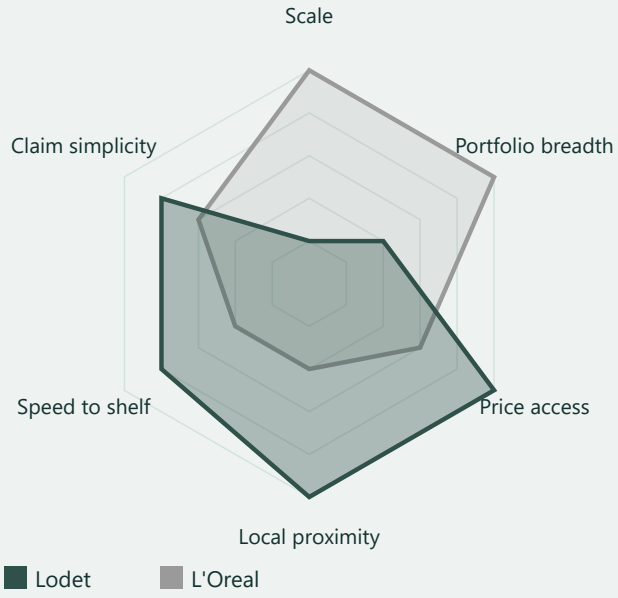
# Lodet and L'Oreal, side by side

L'Oreal reported about €43.5bn of sales in 2024, 5.6% like-for-like growth and a 20% operating margin across 37 international brands. Lodet is a single Tunisian house. The comparison that matters is not size but shape.

**PORTFOLIO SHAPE: L'OREAL DIVISIONS (SALES) VS LODET SHELF (PRODUCTS)**




**POSITIONING, 1 TO 5**




Editor's assessment, not a measurement.

**WHERE EACH ONE WINS**

| DIMENSION | LODET | L'OREAL |
|---|---|---|
| Scale | **One house + partner ranges** | 37 brands |
| Entry price | **11 TND** | Mass to luxury |
| Language | **FR + AR, local** | Global, localised |
| Speed | **Weeks** | Seasons |
| R&D depth | **Partner formulas** | Group research |
| Her trust | **Neighbourhood** | Brand heritage |

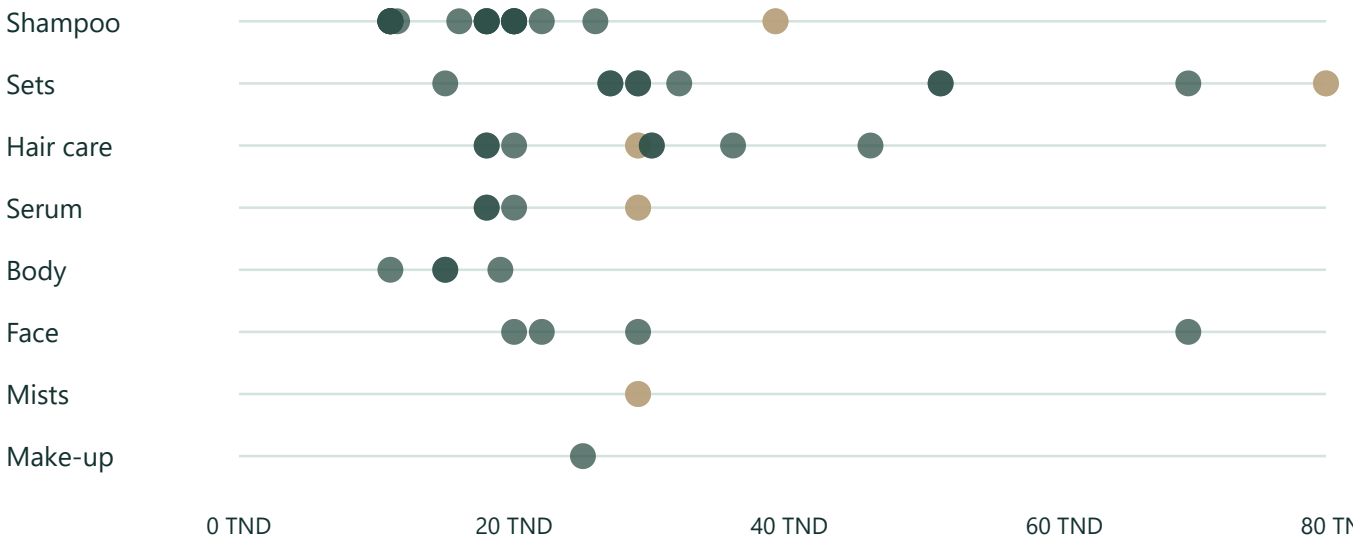
> Lodet's edge is proximity: price, language and speed. Defend those three.

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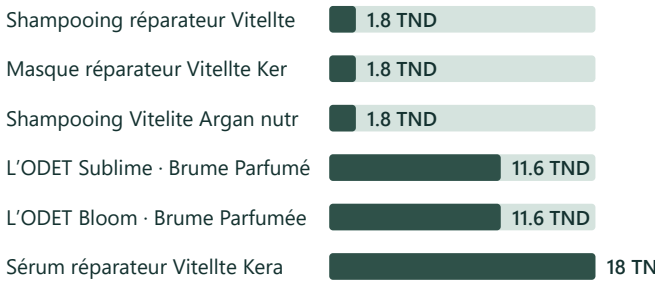
# Efficiency: what each dinar buys

Every figure here is counted from the Lodet shop catalogue. Large formats make Lodet one of the cheapest ways to wash well; the house line is where brand and margin live.

**EVERY PRODUCT BY PRICE (TND) · HOUSE LINE IN ACCENT**




**COST PER 100 ML BY FORMAT**




**THE AMINO HAIR RITUAL**



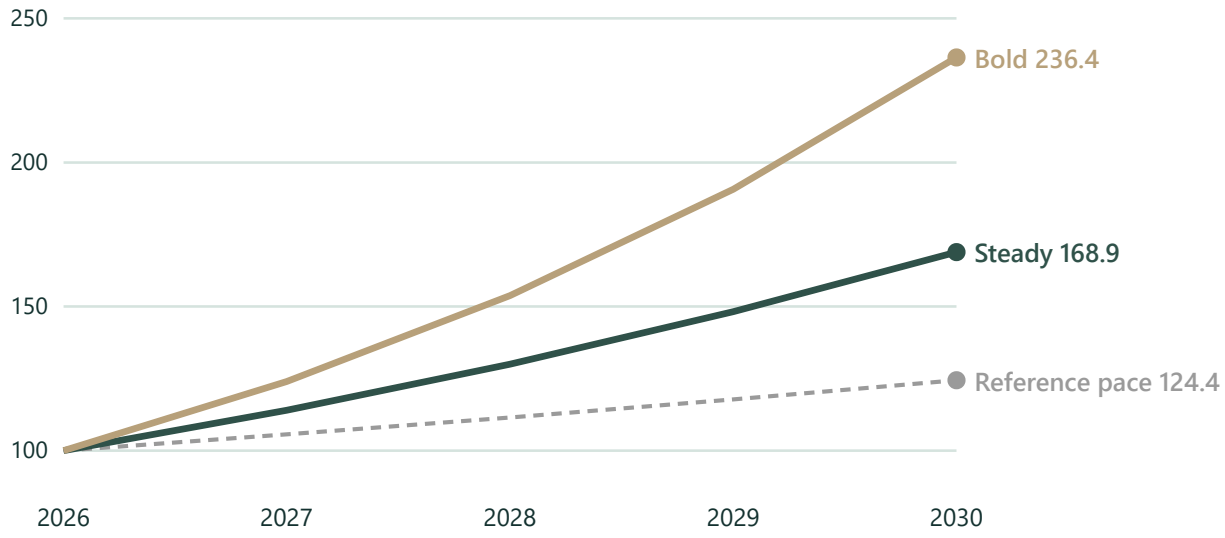

97 TND, about €29 at 3.4 TND per euro (rate assumption).

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# Growth scenarios

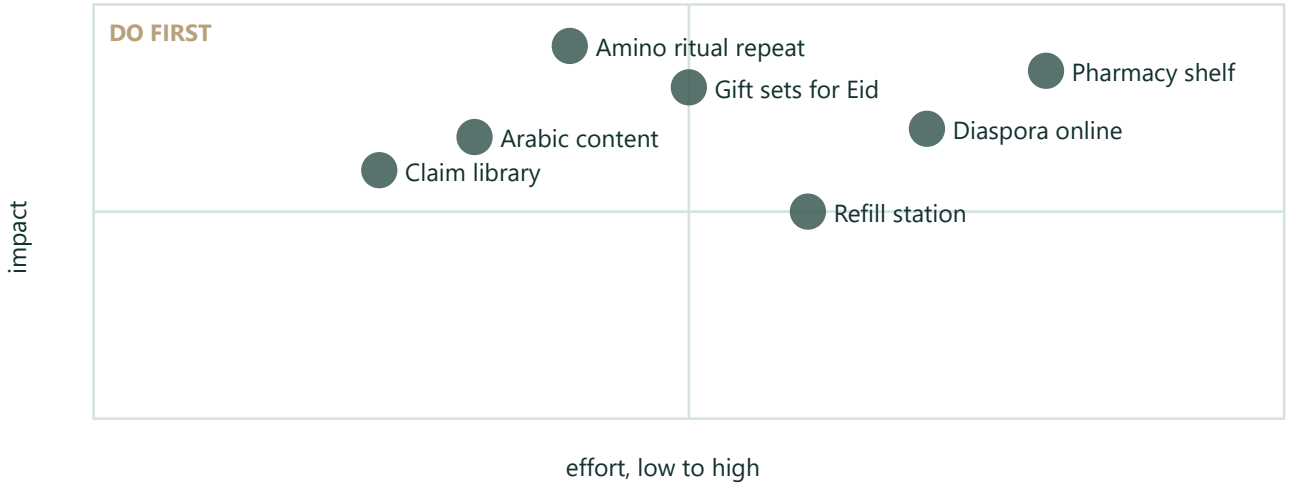
Lodet has published no revenue figure, so growth is shown as an index (2026 = 100) under three stated assumptions. These are scenarios to argue with, not forecasts.

**INDEX, 2026 = 100**




| SCENARIO | RATE | 2030 | DOUBLES IN | WHAT HAS TO BE TRUE |
|---|---|---|---|---|
| **Reference pace** | 5.6% a year | 124.4 | 12.7 years | L'Oreal FY2024 like-for-like growth, used as a yardstick |
| **Steady** | 14.0% a year | 168.9 | 5.3 years | the Amino hair ritual earns repeat purchase; Eid and Women's Day gifting sets |
| **Bold** | 24.0% a year | 236.4 | 3.2 years | adds pharmacy shelves and the Tunisian diaspora online |

**GROWTH LEVERS: IMPACT AGAINST EFFORT**



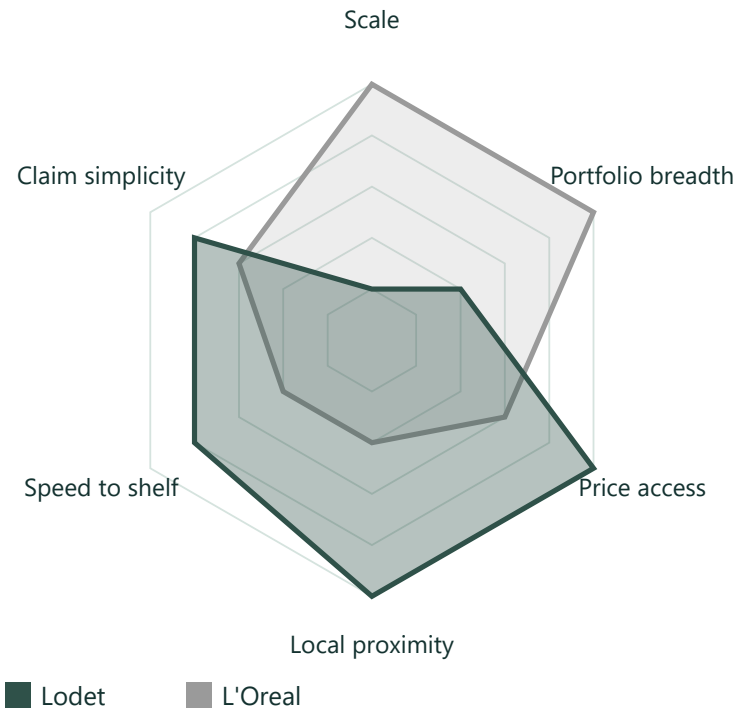
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# Market focus: Category Report

Where can a Tunisian house win against a global portfolio? The original question of this report, asked of Lodet.

| AREA | STATUS | READ |
|---|---|---|
| **Mass hair care** | Crowded | L'Oreal Consumer Products leads |
| **Local family shelf** | Open | Price access + Arabic voice |
| **Perfumed mists** | Open | Gift moments, low entry price |
| **Dermo skincare** | Contested | Needs evidence before claims |

**PICTURE**






> She does not need more products. She needs the right three, explained in her language.

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# Sustainability that can be proven

From 27 September 2026 the EU bans generic environmental claims under Directive (EU) 2024/825, and cosmetic claims already answer to Regulation (EU) 655/2013. L'Oreal answers with a group programme, L'Oreal for the Future. Lodet answers with fewer bottles and plainer words.

### THREE ORIGIN STORIES, ONE BRAND: THE CLAIM TO SETTLE FIRST




**"Produits importés de l'Italie"** · poster




**"Origine Italie"** · social set




**"L'Odet Paris, est."** · bottle

The brand story says made in Tunisia. Under 655/2013 an origin is a claim like any other: pick the true one, hold the proof, print it everywhere the same way.

### PACKAGING PER LITRE

**250 ml format**



**4 bottles** per litre of product

**1000 ml format**



**1 bottle** per litre of product

### KILL LIST, AND WHAT TO SAY INSTEAD

| STOP | SAY INSTEAD |
|---|---|
| Clean beauty | Formulated without the ingredients listed on pack |
| Eco-friendly | Bottle: 1000 ml, one bottle per litre |
| Natural | Contains argan oil (name the % only when measured) |
| Green | Name the one origin printed on pack, nothing more |

### LODET VS L'OREAL

| | LODET | L'OREAL |
|---|---|---|
| Proof | Formats; origin to settle | Group reporting |
| Exposure | Low, few claims | High, many markets |
| Next step | Refill pilot | Programme targets |

> A small brand is most credible when it claims little and proves all of it.

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# Her day, unhurried

The Lodet woman keeps her own rhythm. She is calm, careful with money and loyal to what works. The range already covers her day; the job is to tell her so.

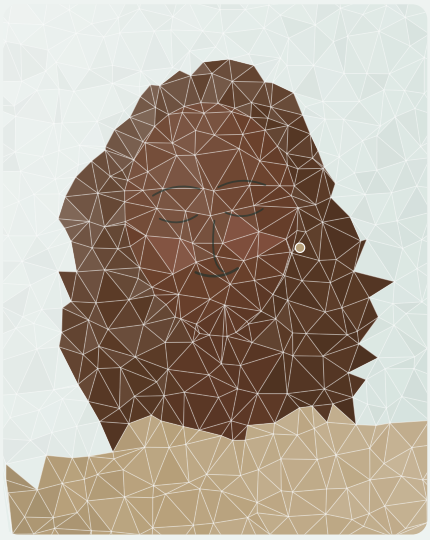
| 08:00 | 13:00 | 20:00 | Sunday |
|---|---|---|---|
| Morning | Midday | Evening | Her hour |
| Bloom mist 250 ml | Venelle SPF 45 | Sublime mist 250 ml | Hydra Keratin set |
| 29 TND | 29 TND | 29 TND | 79 TND |



## Salma, 31

**Hair**

Colour-treated hair, little time on weekdays. **Wants one ritual she trusts, not ten products.**



## Ines, 42

**Family**

Buys for the whole bathroom shelf. **Wants honest prices and one brand for the house.**



## Yasmine, 26

**Mist and gifts**

Self-treat, gifts for Eid and Women's Day. **Wants to feel beautiful without effort.**

Personas are composites for planning, drawn as mesh portraits; no real person is shown.

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# Decisions and basis

Each decision has one owner and a date.

| # | DECISION | OWNER | BY |
|---|---|---|---|
| D1 | Defend the family-shelf position in pharmacy | Commercial lead | 15 Dec |
| D2 | Test perfumed mists as the gift entry point | Brand lead | 31 Jan |
| D3 | Show every Lodet figure with its source | Brand lead | Ongoing |
| D4 | Review these scenarios against real sales | General manager | 31 Mar |

**BASIS**

Lodet: the shop catalogue (57 products, prices in Tunisian dinars, October 2026). L'Oreal: FY2024 published results, rounded. Regulation: EU 1223/2009, EU 655/2013, Directive (EU) 2024/825.

**READ WITH CARE**

Growth paths are illustrative scenarios. Positioning scores are an editor's assessment. Euro values use 3.4 TND per euro. No Lodet sales, share or efficacy figure is quoted because none has been measured.

> Clean first. Soft after. Warm always.